# GETTING STARTED



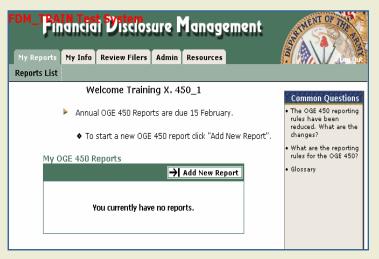
The Financial Disclosure Management (FDM) application automates the confidential and public financial disclosure process allowing financial disclosure reports to be filed electronically. The product features financial disclosure report creation, submission and review that can be easily accessed through a secure website.

FDM is personalized to your FDM role. Specific Tab and Menu items display depending upon your FDM role. Assistants see the tabs related to the FDM user they are assisting.

# Filers and Filer Assistants

# **Report List**

The Reports List displays all the financial disclosure reports a filer has created. This page is the starting point where Filers and Filer Assistants begin creating financial disclosure reports or where filers would go to amend a report that is under review. If a Filer Assistant has more than one filer, they can select the filer through a dropdown list on the page.



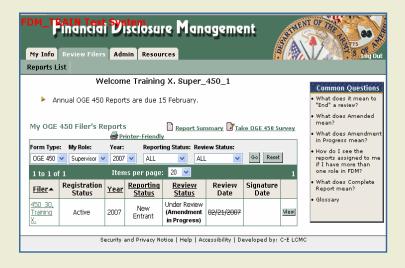
# Reviewers

ADAEO, Senior Legal Counsel, Supervisor, Ethics Counselor,

SLC Assistant, Supervisor Assistant

# **Report List**

The Reports List displays all the financial disclosure reports a filer has created. Review Filers | Reports List is where an FDM reviewer can view, end a review or eSign a financial disclosure report. This page also advises the reviewer if there are pending registrations.



# My Info

## My Assistants

The My Assistants page displays any Assistants that a Filer has selected. Assistants can be added and removed from this page.



#### **Contact Information**

The Contact Information page contains a Filer's personal information. Information on this page can be updated and saved at any time. This page displays the first time a Filer logs into the system for editing and/or verification.



# My Profile

The My Profile page displays the review chain and Assistants, if any, of the Filer. A Filer can change their Supervisor and Senior Legal Counsel on this page by clicking the Change button next to each role and follow the process.



# My Info

## My ECs

The My ECs page lists a Senior Legal Counselor's ethics counselors. From this page, Senior Legal Counsels have the ability to add or remove associated ethic's counselor.



## My Assistants

The My Assistants page displays any Assistants that a Supervisor or Senior Legal Counsel has selected. Assistants can be added and removed from this page.



## My FILERS

The My Filers page displays filers if associated to a Supervisor, Senior Legal Counsel. From this page, you can:

- add a new Filer to FDM
- change a Filer's review chain
- change a Filer's role
- delete a filer if they have not submitted a financial disclosure report.

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# **Report Data**

Report Data is the main area used for preparing and reviewing a financial disclosure report. Filers and Filer Assistants can access Report Data by selecting **My Reports** | Report List and then clicking either **Add New Report** or by clicking either **View** or **Edit** beside an existing financial disclosure report. Reviewers and their Assistants or Ethics Counselors can access Report Data by selecting **My Filers** | Report List and then clicking **View** beside a financial disclosure report with the status of Under Review.



Other tabs within Report Data are:

Attachments	Within Attachments, a Filer can add, replace or delete attachments and Reviewers can view any associated attachments.
Comments	Within Comments, Filers and Reviewers can record their comments on a financial disclosure report. Filers can edit comments if the financial disclosure report has a draft status. Once a financial disclosure report has been submitted, comments can only be amended.
Flags	Within Flags, Filers and Reviewers can review any financial disclosure report flags, to note any missing or invalid information.
Audit Trail	The Audit Trail tracks and time stamps all changes made to the report.
View/Print	Within View/Print, a Filer or Reviewer can view and print a financial disclosure report, flags, comments, job description.
Review Status	Review Status page shows the progress of a financial disclosure report, which includes signing status, a list of assigned reviewers and their role as well as their review and signature date.

# **Admin**

The Admin tab is used to add or edit FDM users. The sub-menu items that display under this tab are dependent upon the role(s) that have been assigned to an individual, i.e., if an individual is only a Supervisor within the system, then only the Supervisor and Pending sub-menu items display.

#### **Filers**

From this page, a Senior Legal Counsel, Senior Legal Counsel Assistant, Supervisor, and Supervisor Assistant can add, edit, delete and establish a Filer's review chain.

## **Supervisors**

From this page, a Senior Legal Counsel, Senior Legal Counsel Assistant, Supervisor, and Supervisor Assistant can add, edit, and delete a Supervisor in FDM. In addition, a Senior Legal Counsel can also be established for the Supervisor and Filers can be reassigned on either a permanent or acting basis.

## **Senior Legal Counsel**

From this page, a Senior Legal Counsel or Senior Legal Counsel Assistant can add or delete a Senior Legal Counsel within FDM. In addition, filers can be reassigned to another Senior Legal Counsel either on a permanent or an acting basis.

## **Pending**

From this page a Senior Legal Counsel, Senior Legal Counsel Assistant, Supervisor, and Supervisor Assistant can view a list of self-registered Filers and either confirm, deny or edit the filer's registration within FDM.

### User

From this page, Senior Legal Counsel, Senior Legal Counsel Assistant, Supervisor, and Supervisor Assistant can search for current FDM users and view the user's profile and the profiles of any other associated users.